



Introduction

This report provides an overview of the North American market demand for advanced fibers. As this market is becoming increasingly globalized, attention will also be given to international developments in the market that have specific effects on the North American market. The report describes the main applications for these fibers, relative pricing across applications, and companies in the supply chain.

1.1 SCOPE OF THE STUDY

The information provided here relates to the following geographical markets:
North America, with reference to global market trends affecting advanced fibers

1.2 PRIMARY FIBERS & MANUFACTURERS COVERED

Advanced engineering fibers including para-aramids, HMPE, PBO and LCP are covered in this report. The notable exclusions of fibers that are traditionally considered “advanced” or “high performance” fibers are the meta-aramids such as Nomex from DuPont, as well as PBI from Celanese. Both of these fibers are primarily used in heat-sensitive or heat protection applications. However, both fibers will be addressed indirectly in this report, as they affect the sales and marketing of related fibers, such as Kevlar and Vectran, particularly from a strategy standpoint, or where they are used in composites or complex weaves with other advanced fibers.

The fibers reported on are as follows:

Para-Aramids:

- Kevlar family (DuPont)
- Twaron & Technora (Teijin / Teijin Twaron)

HMPE (High Modulus Polyethylene)

- Spectra / Spectra Shield (Honeywell)
- Dyneema (DSM)

PBO (Polybenzoxazole):

- Zylon (Toyobo)

Liquid Crystal Polymer:

- Vectran (Celanese)

1.3 APPLICATIONS

Applications for use of advanced fibers will be discussed in more detail, as well as major players within each application, and relative strengths and weaknesses of the fibers in those applications. Other factors including the pricing, supply chain, and market trends within each application will be discussed.



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